



C A L I F O R N I A

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California Department of Food and Agriculture
A.G. Kawamura, Secretary

CWT OPENS BIDDING FOR SECOND DAIRY HERD RETIREMENT PROGRAM



In response to increasing cow numbers and declining milk price futures, on October 1, 2004, the farmer-led and farmer-funded CWT program opened a one-month bidding period for a second program to retire entire dairy herds. CWT will be accepting bids until October 30, 2004, from interested dairy farmers willing to sell their milking herds to slaughter. Producers who wish to bid must be paying the five-cent per hundredweight CWT membership assessment, either through their cooperative, or directly.

This year's program has been targeted to remove 870 million pounds of milk, 260 million pounds more than was removed during last year's herd retirement. To achieve this goal, CWT management expects to retire individual herds totaling 49,000 cows, nearly 50 percent more than in the autumn of 2003. It has been estimated that CWT's last round of activities resulted in a 59-cent per hundredweight increase in the monthly average All-Milk-Price between October 2003 and September 2004.

The herd retirement program will again operate under regional safeguard limits to guarantee that milk production capacity reductions in any one area do not negatively impact local supplies. While the safeguard levels are strictest in areas where supply hasn't grown rapidly, such as the Northeast and Upper Midwest, larger safeguard ceilings have been set for regions that have experienced greater supply growth, such as the West and Southwest.

Herd Reduction Program Timeline:

- Oct 1-30, 2004: Bids accepted
- Nov 8, 2004: Bids will be reviewed by CWT staff
- Nov 18, 2004: Final bid selection
- Nov 24, 2004: Notification of successful bidders to field auditors
- Dec. 1, 2004: Field audits begin
- Dec. 15, 2004: Notification by letter to successful/unsuccessful bidders
- Dec. 1-March 30, 2005: Field audits/ herd removal completed

For more information on how to participate in CWT's herd retirement, please visit the website at www.cwt.coop, or call 888-INFO-CWT (888-463-6298). ☀

C A L I F O R N I A D A I R Y P R O D U C E R N E W S

September Milk Production

Milk production in California for September 2004 totaled 2.976 billion pounds, up 5.2 percent from September 2003. USDA's estimate for U.S. milk production for September 2004 in the 20 major dairy states is 11.9 billion pounds, up 1.3 percent from September 2003. Production per cow in the 20 major states averaged 1,529 pounds for September, 18 pounds above September 2003. ☀

Minimum Class Prices

Statewide average hundredweight prices

Class	Sept.	Oct.	Nov.
1	\$15.78	\$16.14	\$15.79
2	\$13.89	\$13.14	\$13.14
3	\$13.72	\$12.98	\$12.98
4a	\$11.91	\$12.65	N/A
4b	\$14.01	\$14.03	N/A

Federal Order and California Minimum Class 1 Prices

Average Hundredweight Prices

Regions	Sept	Oct	Nov.
Phoenix, Arizona	\$16.29	\$17.13	\$N/A
Southern California	\$15.92	\$16.28	\$15.93
Portland, Oregon	\$15.84	\$16.68	\$N/A
Northern California	\$15.64	\$16.01	\$15.66
Boston (Northeast)	\$17.19	\$18.03	\$N/A

Quota Transfer Summary

For September 2004, eleven dairy producers transferred 4,859 pounds of SNF quota. September quota sales averaged \$455 per pound of SNF (without cows), average ratio of 2.32. For October 2004, nine dairy producers transferred 4,838 pounds of SNF quota. October quota sales averaged \$457 per pound of SNF (without cows), average ratio of 2.48. ☀

Alfalfa Update: October

Northern California: Premium and Supreme alfalfa was steady with good demand and limited supplies. Fair and Good alfalfa was steady with light to moderate supplies. Retail and Stable hay was also steady with only moderate supplies. The end of the month brought rain and slowed production and movement of hay, bringing the hay season to a standstill.

Southern California: Premium and Supreme alfalfa not well tested. Fair and Good alfalfa was steady in a light test with good demand and moderate supplies. Retail and Stable hay was steady with most hay coming out of barns. Rain storms late in the month limited new sales and movement of hay. Most hays are in barns now and many buyers are waiting on buying as they are experiencing higher quotes on hay. ☀

Supreme Hay Prices

Statewide average prices per ton

Area	10/1	10/8	10/15	10/22
Petaluma	\$168-180	\$167	—	\$160-180
North Valley ¹	\$160-175	\$160-170	\$150	\$159-180
South Valley ²	\$168-182	\$168-178	\$165-180	\$160-195
Chino Valley	\$150	—	—	—

¹ North Valley is Escalon, Modesto and Turlock areas.

² South Valley is Tulare, Visalia and Hanford areas.

Alfalfa Hay Sales/Delivery

	Sept.	Oct.
Tons Sold ¹	153,485	133,946
Tons Delivered ²	69,858	58,275

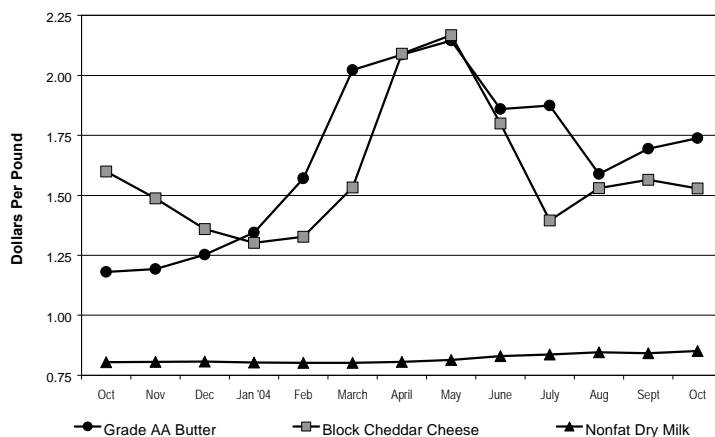
¹ For current or future delivery.

² Contracted or current sales.

Alfalfa hay sales, deliveries and Supreme quality prices per ton, delivered to dairies, as reported by the USDA Market News Service, Moses Lake, WA, (509) 765-3611, <http://www.ams.usda.gov/marketnews.htm>

Grade AA Butter, Block Cheddar Cheese, and Nonfat Dry Milk Prices Used in the Calculation of California Class 1 Milk Prices

Grade AA Butter, Block Cheddar Cheese, Nonfat Dry Milk Prices
Used in the Calculation of Class 1 Prices



California Alfalfa Hay Situation and Outlook for 2004/2005

by Seth Hoyt, California Agricultural Statistics Service - USDA/CDSA

The alfalfa hay market in California made a strong recovery in 2004. While a major factor for the turnaround was sharply higher milk prices the first half of the year which boosted profitability in the dairy industry, lower alfalfa hay acres and production also played a part in the recovery. Irrigation water shortages the second half of the season in some areas, particularly central California, reduced alfalfa hay production from earlier expectations. Normally, alfalfa hay growers would be doing all they could to maximize production when the market was at profitable levels. However, some growers who depended on surface water supplies for irrigation had no choice but to cut their usage. Another bullish factor in the market place in California was increased demand from beef cattle producers in some areas where dry grass on foothill pastures was short. Not since the late summer and early fall of 2001 had California alfalfa hay growers experienced such strong overall buyer interest.

Alfalfa hay yields in California were on a record pace the first half of the 2004 season. Many growers began their first cutting two weeks earlier than normal and unlike 2003, growing and harvesting weather was excellent. However, yields began to taper off for some growers by mid-summer due to tight supplies of surface water for irrigation, particularly in central California, worm infestations in some areas, and whitefly problems in the Imperial Valley.

Some growers in the north central area indicated that fifth and sixth cutting tonnage was down but couldn't explain why. In spite of disappointing tonnage the second half of the season, quite a few growers indicated their alfalfa yields were still higher than 2003 and many were above normal. The preliminary alfalfa hay yield forecast for 2004 was 7.2 tons per acre, equal to the record highs in 1997 and 2001. The final survey on 2004 alfalfa hay yields will be in December when growers have a better handle on their actual yields for the season.

Another positive for alfalfa hay growers in 2004 was the return of strong expansion of dairy cow numbers. This is significant because the dairy industry purchases approximately 80 percent of the alfalfa hay produced in California. The return of 4,000 month-to-month growth in dairy cow numbers was the highest since early 2003 and compares to a low of approximately 2,000 head in the fourth quarter of 2003. While springer dairy heifer demand and prices were very good in 2004, a big factor in the expansion of cow numbers was a drop in dairy cow culling and

slaughter. The normal 30 to 35 percent cull rate in California dairies dropped to the low 20's in the spring of 2004. Dairy cow slaughter in the January through August 2004 period was down 13 percent from the same period in 2003, with slaughter down 27 percent in May compared to the year before. Dairy cow cull rates were moving up from their spring lows in the late summer and early fall of 2004.

The higher alfalfa hay market was the main reason for an 18 percent increase in alfalfa hay shipments into California in the first seven months of 2004 compared to the same period last year. Not only did this reverse a two-year decline in alfalfa hay shipments by truck into California but it also halted a drop in shipments that reached a ten-year low in 2003.



While it appears that shipments for the remainder of 2004 will outpace the previous year, shipments could have been even higher had it not been for rain damaged hay in Nevada and at times a shortage of trucks. The biggest year-to-year turnaround in shipments were from Utah which were up 68 percent in the January through July period. Except for Arizona, a fair amount of alfalfa hay shipped into California from other states is normally higher quality, milk cow hay.

According to USDA Market News, Supreme quality alfalfa hay delivered to Tulare-Visalia-Hanford areas averaged \$169.08 per ton in the January through September 2004 period. This was on pace to break the yearly record price set in 1997. While the average price on Fair quality, dry cow alfalfa hay during this same period at \$120.22 per ton delivered, was below the 2001 record, prices were very bullish in early fall of 2004.

Although demand for alfalfa hay for export was mixed and not a big factor in the overall hay market in California in 2004, it was a big boost to the market in the northern California mountain area. Due to rain that damaged first cutting alfalfa hay in the Pacific Northwest, export buyers, particularly from Washington were aggressive purchasers in the northern California mountains for first and second cutting. Market impacts from export buyers in other areas were minimal due to a

(Continued on next page)

Alfalfa Hay - Continued

strong market and stiff competition. Alfalfa hay exports from California ports in 2003 at nearly 35,000 tons were less than one-half of one percent of California's alfalfa hay production that year. Fewer acres and tighter supplies of Sudan hay in 2004 made for a very bullish market. West coast exports of baled hay to Japan in the January to July 2004 period were down 13 percent from the same period last year. Exports to Japan from Australia were up 11 percent during the same period and Canada exports doubled from the drought reduced shipments in 2003.

ALFALFA HAY OUTLOOK FOR 2005

Historically, in a year such as 2004 when alfalfa hay prices are very strong, you could pretty much guarantee increased hay acres the following year. For example, after the record high alfalfa hay prices in 1997, alfalfa hay acreage in California rose 100,000 acres the next year to 1,050,000 acres. Similarly, after a very good alfalfa hay market in 2001, alfalfa hay acres surged 150,000 to 1,160,000 acres in 2002. In both of these instances, lower hay prices followed the next couple of years. Sources indicated alfalfa hay seed sales are up in California in the fall of 2004. However, seed company representatives I spoke with said it was a little early for a good handle on seed sales and alfalfa hay acre estimates for 2005. I should have a better pulse on this when I speak at the National Alfalfa Symposium in San Diego in December.

While some in industry think alfalfa hay acres in California will be up in 2005, there are others that think it really depends on one major factor - **Water**. A dry winter could limit the expansion of alfalfa hay acres in California in 2005. If surface water supplies are tight again next year, well water for irrigation



could be an expensive option. Higher diesel fuel prices have substantially increased the cost of pumping ground

water for irrigation. On the flip side, with the significant decline in the feed corn and other grain markets since the first quarter of 2004 and with few crop alternatives, some growers may expand alfalfa hay acres regardless of the uncertainties. If predictions for a wet winter in California hold true,

Spring 2005 planting of alfalfa hay could be above normal. Some growers in central California will not plant increased alfalfa hay acres unless the outlook for irrigation water supplies improve. While some alfalfa hay acres have been converted to almonds (the "hot crop" in California), this is not an option for many hay growers. Some almond growers have reportedly leased farm land to ensure they have irrigation water for their trees in 2005 if it's another dry year.

In some areas, such as the Imperial Valley, the lack of profitability farming alfalfa hay is a growing issue. Higher break-evens on alfalfa hay due to the rising cost of fuel, fertilizer, and other inputs are pushing some growers into other crops. One grower in the Imperial Valley that is fortunate to have the right soil, switched to vegetable crops and sold all of his hay equipment. He stated "I am tired of losing money on alfalfa hay." Other growers with marginal soil are limited to crops they can plant, such as alfalfa hay. As the exodus of dairy cows from Chino continues and with Imperial Valley alfalfa hay growers having a freight disadvantage to growers in the San Joaquin Valley, the long term outlook is for less alfalfa hay acres in the southern California desert. In strong market years, such as 2004, the freight disadvantage will not be as critical but during years of ample supplies, such as 2003, Imperial Valley alfalfa hay growers were hit hard, particularly on their dry cow quality hay.

Some in the industry do not think there will be a large conversion of cotton acres to alfalfa hay in 2005. The Upland cotton market, after a positive outlook in the fall of 2003, deteriorated significantly the past year. However, sources indicate that by using the futures options market, forward contracts, and the Government Loan program, many cotton growers had a good to very good year. One source stated that if cotton acres decline in 2005 it may be due more to tight irrigation water than any other factor. Another reason that may limit the conversion of cotton to alfalfa is the three-year commitment with alfalfa hay. Cotton growers that switched to alfalfa hay two years ago found a depressed hay market the second half of 2002 and 2003. There may be some conversion of processed tomato acres to hay in the north central and northern valley. While some processed tomato growers, particularly in central California had a banner year, other growers farther north were not so fortunate. Delays in harvesting caused tomatoes to over mature and product loss at harvest was substantial.

It doesn't appear that the export market will be much of a factor in the overall California alfalfa hay market in 2005. While sources believe Sudan hay acres in the Imperial Valley could be up in 2005, acres in the central

(Continued on next page)

Alfalfa Hay - Continued

and northern valley will depend on water supplies and early buyer contracts. As some new growers of Sudan have learned, producing Sudan hay to meet the quality specifications for the export market can sometimes be a challenge.


Demand for hay for the horse market was fairly constant in California in 2004 and should remain so in 2005. Market fluctuations will be driven by total supplies of hay. Tighter hay supplies in the early fall of 2004 caused a firming retail/feedstore market. There has been a shift the past few years to more demand for alfalfa-grass mixtures or straight grass hay. Some horse owners will feed alfalfa one feeding and grass or oat hay the other feeding. While a substantial amount of alfalfa hay is still being fed to horses in California, a growing number of horse owners have found that feeding straight alfalfa puts too much flesh (fat) on their horses. Orchard grass hay at some feed stores in October 2004 was selling at a higher price than their number one alfalfa hay.

And last but certainly not the least of the factors affecting the California alfalfa hay market in 2005, is the financial condition and the continued herd expansion in the dairy industry. Some say 2004 has been the best year ever financially in the California dairy industry. On October 5, 2004, milk futures prices on the Chicago Board of Trade for the first half of 2005 ranged from \$12.00 to \$12.30 per hundredweight. While this is below the cash market for most of 2004, it is much better than the \$9.25 to \$9.75 cwt. milk prices the first half of 2003.

While overall input costs have gone up for dairy producers, a big positive is the 40 percent decline in corn prices since the early spring of this year. Because feed costs represent almost half of a dairy producers cost of production, this is significant. Other grain and protein feed markets have also made substantial declines. With the forecast of an 11 billion bushel U.S. corn harvest in 2004 and with projected large world supplies of coarse grains in 2005, corn prices could be at competitive price levels much of next year. This could boost milk production as the amount of concentrate fed to milk cows may reverse the lower trends of the past two years. Additionally, some dairymen producers have increased the amount of corn and other silage feeding which has helped reduce feed costs. An early estimate of 390,000 acres of corn silage in California in 2004 is 73 percent higher than in 1993, although some, if not much of this can be attributed to the rapid growth in dairy cow numbers during that period. Hay industry sources believe the increased silage usage by the dairy industry has had only a


minimal impact on the overall demand and market on alfalfa hay. Dairy industry sources believe that with the drop in grain prices, the more efficient dairy producers can still be profitable with \$12.00 milk.

CONCLUSION

Tight supplies of alfalfa hay in the fall of 2004 and what many believe will be a smaller carryover of hay into next year in California could be positive for the alfalfa hay market in the early 2005 season. Even if alfalfa hay planting in late 2004 is above expectations, the early market in 2005 and possibly the first half of the season could still be strong. If moisture levels are below normal this winter in California and the West, the alfalfa hay market could be bullish throughout 2005. If moisture levels are normal to above normal, the alfalfa hay market may be strong the first half of next season but then possibly come under pressure the second half due to increased production and increased alfalfa hay shipments from out-of-state. Water and profitability in the dairy industry will be the leading factors affecting the California alfalfa hay market in 2005. 

Department Denies Petition

On September 24, 2004, the Department received a petition from Dairy Institute of California to consider changes to the Class 1 pricing formulas in Northern and Southern California. Dairy Institute of California is a trade association representing over 70 percent of the fluid milk, cultured milk products, and frozen dairy products processed in the state.

After careful consideration of the merits of the petition, the Department decided not to call a hearing at this time. Should you have any questions concerning the petition, please contact David Ikari at (916) 341-5988. 

California Dairy Review Available on Dairy Marketing Website

A reminder to readers that this publication is available on the Dairy Marketing Branch website at http://www.cdfa.ca.gov/dairy/ca_dairyrev_newsletter.html

If you would prefer to download this publication each month, thus helping us reduce printing/mailing costs, please email Karen Dapper at kdapper@cdfa.ca.gov stating your request.

Healthy Weight with Dairy

Safeway Partners with Dairy Checkoff in 3-A-Day of Dairy Program

As a program partner, Safeway will include the 3-A-Day logo on its private label milk, cheese and yogurt products that meet the program's calcium qualifications. Additionally, the chain will prominently use the 3-A-Day logo in its newspaper feature ads on an ongoing basis to remind its shoppers of the need to include three servings of milk, cheese or yogurt as part of their daily diet.

To date, about 30 of the nation's top retail chains, along with many independent and wholesale grocers, have signed on to 3-A-Day of Dairy promotions. These dairy retail partners represent more than 60 percent of total U.S. grocery sales. For a partial listing of the dairy checkoff's 3-A-Day partners, visit www.dairycheckoff.com and click on the 3-A-Day logo.



Look for the New 3-A-Day Weight Loss Logo

A cornerstone of the new program is a 3-A-Day of Dairy logo that highlights the new weight loss benefit associated with milk, cheese and yogurt products. The new logo incorporates the existing 3-A-Day logo, along with the claim "burn more fat, lose weight" and a context statement to further explain the science. Currently, 3-A-Day of Dairy retailer and branded dairy manufacturing partners are using the logo on qualified milk, cheese and yogurt packaging, in-store promotional signs, newspaper feature ads, direct mailers, and other merchandising support. In addition to the new 3-A-Day of Dairy logo, the program also introduces a new partnership between the National Dairy Council®, the nutrition and education arm of the dairy checkoff, and WebMD® Health, the nation's top online medical and health resource to the public and health professionals, with more than 20 million visitors to its Web site every month.

To coincide with the 3-A-Day of Dairy weight loss program, the revamped 3-A-Day of Dairy Web site (www.3aday.org) launched in early September with a new, more user-friendly design and updated content to better serve the needs of the more than 50,000 people who visit the site each month. ☀

National Dairy Situation and Outlook – USDA Estimates

Milk Production and Cow Numbers

Monthly: Compared to 2003, USDA estimates that overall milk production across the U.S. was up 1.1% in September, led by Arizona's 10.8% growth in milk production (on 10,000 more cows and 70 more pounds per cow). California's estimated production was up 4.9% (on 40,000 more cows and 40 more pounds per cow). Among the western states, Arizona was up 10.8%; New Mexico up 1.7%; and Washington down 4.2%. Four of the top 10 states reported an increase: Idaho 4.4%, Texas 7.7%, New Mexico 1.7%, and California 4.9%.

Quarterly: For the third quarter of 2004 compared to the second quarter of 2004, U.S. milk cow numbers were up 0.4% at 9.030 million, production per cow was down 3.4%; the net effect was a 3.4% increase in milk production to 42.2 billion pounds. USDA projects that for the fourth quarter of 2004 compared to the third quarter of 2004, U.S. milk cow numbers will decrease 20,000 cows to 9.010 million cows, production per cow will be up 0.5%; the net effect would be a 0.2% increase in milk production to 42.3 billion pounds.

Milk Prices

Comparing the third quarter of 2004 to the second quarter of 2004, U.S. average milk prices were down \$3.20/cwt. to \$15.37/cwt. USDA projects that for the fourth quarter of 2004, U.S. average milk prices will be down \$0.10-\$0.60/cwt. compared to the third quarter; including a \$0.90-\$1.50 decrease/cwt. Class 4b price change and a \$0.15-0.75 decrease/cwt. Class 4a price change.

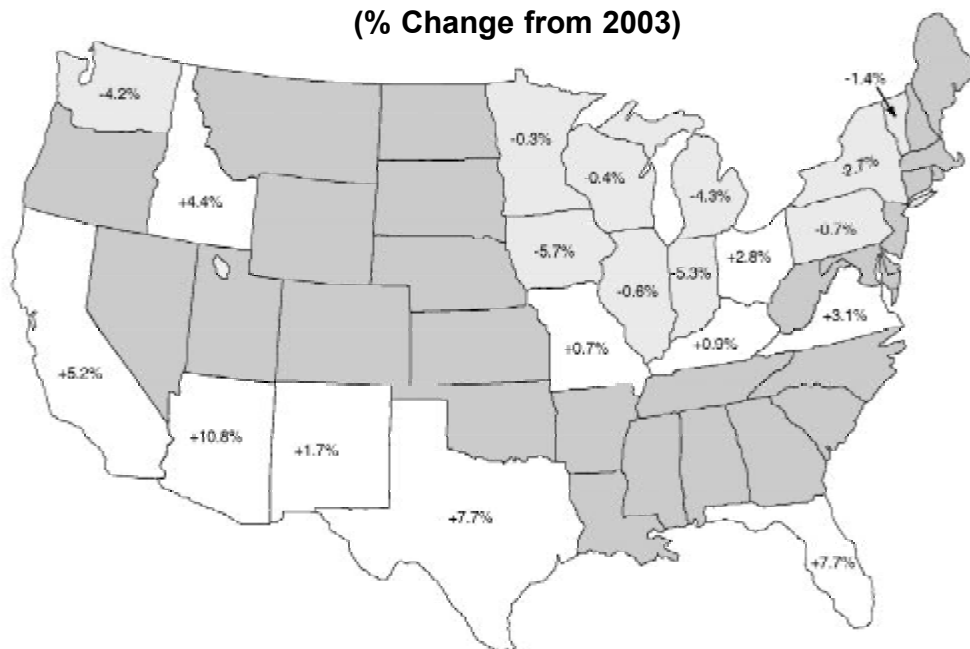
Utility Cow Prices

Comparing the third quarter of 2004 to the second quarter of 2004, average U.S. utility cow prices were up \$2.00/cwt. to a national average of \$54.76/cwt. USDA projects that utility cow prices will average \$54-56 in the fourth quarter of 2004.

Information from the USDA-NASS publication "Milk Production" and the USDA-ERS publication: "Livestock, Dairy, and Poultry Outlook." ☀

September Milk Production in the Top 20 States

(% Change from 2003)



For the U.S. overall, comparing September 2004 to September 2003:

- Milk production during September was up 1.1%
- The number of cows on farms was 9.038 million head, down 20,000 head
- Production per cow averaged 1,507 pounds, 20 pounds more than September 2003
- Ten of the top twenty milk producing states showed a decrease in milk production

As reported by USDA
and CDFA (for California)

The Size of California's Dairy Farms, July 2004

Range of Milk Marketings	Number of Grade A Farms	Percent of Total Grade A Farms	Percent of Total Grade A Milk Marketings
< 250,000 Lbs.	160	8.21%	0.81%
250,000 to 500,000 Lbs.	280	14.37%	3.53%
500,000 to 750,000 Lbs.	268	13.76%	5.55%
750,000 to 1 Million Lbs.	230	11.81%	6.68%
1 to 1.5 Million Lbs.	325	16.68%	13.39%
1.5 to 2.4 Million Lbs.	333	17.09%	20.93%
2.4 to 5.0 Million Lbs.	271	13.91%	30.23%
> 5.0 Million Lbs. (up to 17.3 Million Lbs.)	81	4.16%	18.89%

California Farms by Size, Comparisons:

- The 352 top-producing dairy farms (18% of the state's dairies) produce 50% of the state's milk marketings.
- The 708 lowest-producing dairy farms (36% of the state's dairies) produce only 10% of the state's milk marketings.
- The group of dairies producing less than 250,000 pounds of milk per month (160 dairies), accounted for less than 1% of the milk marketed.
- In July 2004, there were 81 dairies producing more than 5.0 million pounds of milk per month, an increase of 19% compared to July 2002, when there were 68 dairies producing more than 5.0 million pounds per month.

Hundredweight Pool Prices

Month	Quota	Overbas
March '03	\$10.93	\$ 9.23
April	\$11.02	\$ 9.32
May	\$11.05	\$ 9.35
June	\$11.17	\$ 9.47
July	\$12.72	\$11.02
August	\$13.96	\$12.26
September	\$14.34	\$12.64
October	\$14.45	\$12.75
November	\$13.56	\$11.86
December	\$13.09	\$11.39
January '04	\$12.71	\$11.01
February	\$13.32	\$11.62
March	\$15.44	\$13.74
April	\$18.23	\$16.53
May	\$18.69	\$16.99
June	\$17.46	\$15.76
July	\$15.03	\$13.33
August	\$14.74	\$13.04
September	\$15.21	\$13.51

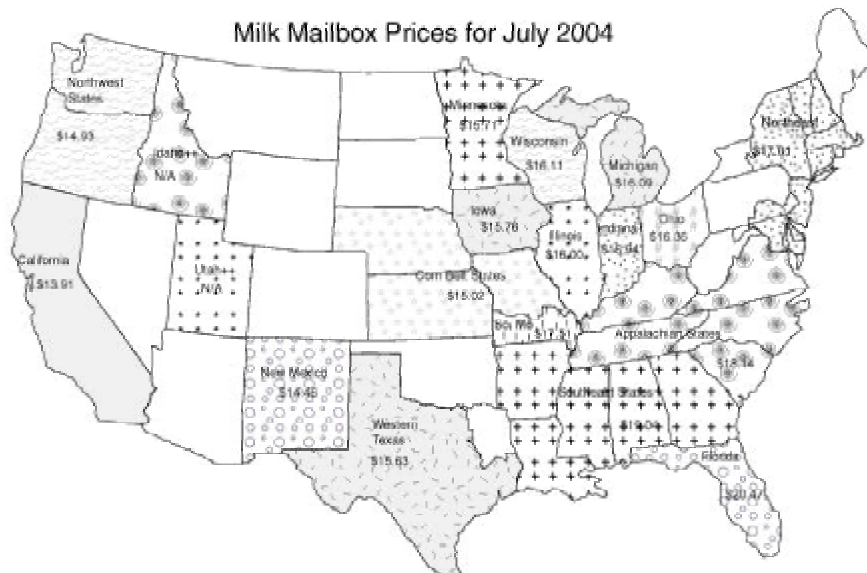
Milk Mailbox Prices

Milk Mailbox Prices in Dollars per Hundredweight

**	Jan '04	February	March	April*	May	June*	July
California*	\$12.11	\$12.69	\$14.65	\$17.21	\$17.57	\$16.38	\$13.91
USDA**	\$13.12	\$13.54	\$15.28	\$17.40	\$19.01	\$18.25	\$16.32

* California mailbox price calculated by CDFA.

** All federal milk market order weighted average, as calculated by USDA.



In July 2004, mailbox prices for selected reporting areas in Federal milk orders averaged \$16.32 per cwt, \$1.94 less than the figure for the previous month. The component tests of producer milk in July 2004 were: butterfat, 3.56%; protein, 2.95%; and other solids 5.70%. On an individual reporting area basis, mailbox prices decreased in all reporting areas, and ranged from \$20.47 in Florida to \$14.45 in New Mexico. In July 2003, the Federal milk order all-area average mailbox price was \$11.74, \$4.58 lower.

**Mailbox prices for Idaho and Utah are being discontinued due to the termination of the Western Federal Order.

In accordance with the California Government Code and ADA requirements, this publication can be made available in an alternative format by contacting Karen Dapper at (916) 341-5988, by email at dairy@cdfa.ca.gov, or contacting TDD 1-800-735-0193.

Dairy Marketing Branch:
 Website: www.cdfa.ca.gov/dairy
 Email: dairy@cdfa.ca.gov
 Phone (916) 341-5988; Fax (916) 341-66

Milk Pricing Information:
 Within California 1-800-503-3490
 Outside California 1-916-442-MILK

The California Department of Food and Agriculture Dairy Marketing Branch publishes the California Dairy Review monthly. Please direct any comments or subscription requests to Karen Dapper at (916) 341-5988 or send an email to dairy@cdfa.ca.gov

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